



REQUEST FOR PROPOSALS

DATE OF ISSUE: August 4, 2016

TO: Potential Providers of Services

RE: **Request for Proposals ("RFP") for MICHIGAN OFFSHORE LIGHTS HISTORIC STRUCTURE REPORT and PUBLIC EDUCATION PROJECT**

I. Services Sought by Authority

The State Historic Preservation Office ("SHPO"), Michigan State Housing Development Authority ("Authority"), in partnership with the National Park Service ("NPS"), is seeking an organization authorized to do business in Michigan to provide the Authority with a consultant to complete the Michigan Offshore Lights Historic Structure Report ("HSR") and Public Education project for four Michigan offshore lights.

Michigan law allows for veterans preference only; however, women-owned, minority-owned, and small businesses authorized to conduct business in the State of Michigan are encouraged to register with Buy4Michigan and submit proposals.

II. Contents of this RFP

- Overview of services sought, tasks and activities ("Scope of Work" or "SOW")
- Exhibit A – Notices to Bidders
- Exhibit B – Proposal Submission
- Exhibit C – Proposal Format
- Exhibit D – Project Personnel Form

III. Overview

The Authority seeks a consultant ("Bidder" or "selected contractor") to complete the Michigan Offshore Lights Historic Structure Report and Public Education project for four Michigan offshore lights.

The selected contractor will also advise and educate Authority representatives related to contractor services sought as outlined below.

IV. Objective, Background & Significance

A. General Objective.

1. The four lights, listed on the National Register of Historic Places, include the Gull Rock Light Station (Lake Superior), the Manitou Island Light Station (Lake Superior), the Stannard Rock Light (Lake Superior), and the Thunder Bay Island Light Station (Lake Huron). This project is funded through a National Maritime Heritage Program ("NMHP") grant and a Michigan Lighthouse Assistance Program ("MLAP") grant.

B. Project Background

1. The SHPO has worked closely with Michigan lighthouse stewards through federal and state preservation programs for over fifteen years. Through this experience, SHPO has recognized the need for planning documents and educational efforts for Michigan's offshore maritime resources. Since offshore resources are difficult to visit and not easily visible to the general public, their stewards face additional challenges when educating the public about the significance of the resources and when attempting to raise funds for rehabilitation projects. To assist these organizations in maintaining and preserving their historic sites, a comprehensive planning document is essential. The creation of these HSRs will provide a solid base for public awareness efforts, for fundraising, and for future rehabilitation projects.
2. This Historic Structure Report and Public Education project consists of four components:
 - a. Gull Rock Light Station HSR and Public Presentation
 - b. Manitou Island Light Station HSR and Public Presentation
 - c. Stannard Rock Lighthouse HSR and Public Presentation
 - d. Thunder Bay Island Light Station HSR and Public Presentation

C. Significance of Historic Resources

1. Gull Rock Light Station

The Gull Rock Light Station was constructed in 1867 to mark the shipping lane between the tip of Michigan's Keweenaw Peninsula and Manitou Island in central Lake Superior. On July 19, 1984, this remote offshore light station was listed in the National Register of Historic Places, as part of the thematic nomination for U.S. Coast Guard Lighthouses and Light Stations on the Great Lakes. The light station was built in a schoolhouse style with a thirty-nine-foot brick tower on a stone foundation. The one-and-a-half-story yellow brick lighthouse is painted white and in 1913 the light was automated. The U.S. Coast Guard maintains a modern light in the lantern room and it continues to guide boaters in the area. The lighthouse and privy are the only remaining structures, but are in remarkably good condition considering their exposure to the elements. Gull Rock has remained a well-known light station in Michigan due to its unique location on Lake Superior and its close proximity to the scene of notable shipwrecks researched by maritime history enthusiasts. The light station can be viewed by visitors on personal watercraft and the picturesque lighthouse is a popular view for passengers on the Isle Royale cruises.

Gull Rock Lightkeepers
P.O. Box 126, Copper Harbor, Michigan 49918
www.gullrocklightkeepers.com
Contact: Mr. Peter Annin; (715)682-1360; pannin@northland.edu

2. Manitou Island Light Station

On July 19, 1984, the Manitou Island Light Station was listed in the National Register of Historic Places. Manitou Island is a ninety-three-acre uninhabited island located in Lake Superior approximately three miles from the tip of the Keweenaw Peninsula. The first Manitou Island lighthouse was erected in 1850. In 1861, Abraham Lincoln authorized the construction of a replacement light station which remains today. This light station and Michigan's Whitefish Point Lighthouse, both built in 1861, are the

oldest iron skeletal light towers on the Great Lakes. Manitou Island experienced further development with the construction of a brick storage building in 1895 and a concrete fog signal building in 1930. The station was automated in 1953 and the U.S. Coast Guard continues to maintain the modern optic in the tower as a functioning aid to navigation. In 2004, the Keweenaw Land Trust (KLT) acquired the light station after it sat vacant for several decades. The KLT acquired the property from the U.S. government under the auspices of the National Historic Lighthouse Preservation Act of 2000. The KLT continues to maintain and rehabilitate the island's historic resources. In 2014, SHPO also awarded KLT a grant to assist in the rehabilitation of the historic dock.

Keweenaw Land Trust
801 N. Lincoln Drive Suite 306, Hancock, Michigan 49930
www.keweenawlandtrust.org
Contact: Mr. Evan McDonald or Mr. Joe Kaplan; (906)482-0820;
info@keweenawlandtrust.org

3. Stannard Rock Lighthouse

Located in Lake Superior on a sandstone shoal approximately twenty-five miles from the nearest land, the lighthouse lived up to its reputation as the loneliest outpost in the United States and the toughest duty post. The exposed crib of the Stannard Rock Lighthouse is rated by the National Park Service as one of the top ten engineering feats in the United States. In 1877, construction of the lighthouse began, taking five years to complete at a cost of three hundred thousand dollars. The concrete and steel plate foundation rises twenty-three feet above the lake and the tower is constructed of stone from the Marblehead Quarry in Ohio. In 1962, after an explosion and fire killed one lighthouse keeper, the light was automated. The lighthouse was transferred to the Superior Watershed Partnership & Land Trust in 2015. Private charters in the area allow passengers to view Stannard Rock from the water, but due to its remote location the public knows little of this resource's historic significance presenting the need for public education. The Stannard Rock Lighthouse is also listed in the National Register of Historic Places.

Superior Watershed Partnership & Land Trust
2 Peter White Drive, Marquette, Michigan 49855
www.superiorwatersheds.org
Contact: Mr. Carl Lindquist; (906)228-6095 Ext. 14; carl@superiorwatersheds.org

4. Thunder Bay Island Light Station

Established in 1832, this station is one of the earliest on Lake Huron and was one of the last staffed stations on Michigan's Great Lakes. The light station was constructed on Thunder Bay Island and is located within the boundaries of the Thunder Bay National Marine Sanctuary. The Thunder Bay Island Light Station consists of a fifty-foot-high tower attached to a two-story dwelling. The light station continued to develop with the construction of the fog signal building, an oil house, and other outbuildings. The original tower was constructed of stone and stood forty feet high to the parapet. In 1857, the tower was raised ten feet, producing the structure still standing today. A ten-sided cast iron lantern surmounts the structure. Sautter of Paris manufactured the original Fourth Order Fresnel lens, but the lens was later replaced with a modern airport-type beacon. Alpena Township owns the Thunder Bay Island Light Station, but the Thunder Bay Island Lighthouse Preservation Society, a nonprofit, maintains the historic light station. The Thunder Bay Island Light

Station was listed in the National Register of Historic Places on July 19, 1984, and remains highly visible to mariners and tourists in the Alpena area.

Thunder Bay Island Lighthouse Preservation Society
P.O. Box 212, Alpena, Michigan 49707
www.thunderbayislandlight.org
Contact: Ms. Susan Skibbe; (989)356-9491; Sueskibbe@hotmail.com

V. Deliverables, Specifications & Schedule

The selected contractor will provide the following services:

1. Deliverables

A total of thirty six hard copies of the document will be distributed. One hard copy and an electronic copy of each draft of the HSR for each of the four project components shall be distributed to: 1) the federal level partners, 2) the SHPO, and 3) the lighthouse non-profit organization. The documents shall be submitted for review and approval at the 75% complete stage, the 95% complete stage, and the 100% complete stage. All reviewer comments must be addressed in the report. Conflicts in information, recommendations, or review comments may need to be resolved by meeting with all project partners.

The public education portion of the project will include four (4) regional public presentations, one for each of the four light stations, and will be conducted by the consultant who has created each HSR. These presentations will take place near the end of the project and will be given at four (4) different locations to be determined in partnership with the SHPO. The consultant and the SHPO will work together to advertise these presentations through online and social media sources. The presentations must be created using PowerPoint and will be distributed to the National Park Service, the SHPO, and the lighthouse stewards for future use.

Each of the four presentations must meet the criteria for learning units under the American Institute of Architects (AIA) Continuing Education System (CES). The proposal must indicate if the consultant is an AIA CES Registered Provider or if a team member is a provider. If neither the consultant nor any team member is an AIA CES Registered Provider, the proposal must specifically state how this requirement will be met.

2. HSR Specifications

All print copies of the HSRs must be in 8 ½ x 11 format and be organized in a three ring binder. Current condition photographs must be included in the body of the text. All associated reports that are referenced in the body of the report must be included in the appendix.

Due to the unique qualities and characteristics of each of the four sites, the HSRs should highlight technological advances that may have led to the establishment of the light station and technological advances that influenced their evolution. Also, due to their isolated and environmentally challenging locations, the social and cultural history of living and working in each of these sites should be documented in the text and through historic photographs of the resources.

The HSR should include the following information in the format shown and should include all historically relevant structures and features on the site.

- a. Management Summary.**
 - i. Cover Page
 - ii. Table of Contents
 - iii. Executive Summary. This introductory text provides a concise account of (a) research done to produce the HSR, (b) major research findings, (c) major issues identified, and (d) recommendations for treatment or use.
 - iv. Administrative Data. This section contains (a) names, numbers, and locational data used to refer to the historic structure, (b) the proposed treatment of the structure including the source document, (c) related studies, (d) cultural resource data including date listed in the National Register, period of significance, and context of significance, period of interpretation if required, and (e) recommendations for documentation, cataloging, and storage of materials generated by the HSR.
- b. Part 1, Developmental History.** This section documents the evolution of a historic structure, its current condition, and the causes of its deterioration. It is based on documentary research and physical examination.
 - i. Historical Background and context. This section describes the people and events associated with the site, and the evolution and developments at the site. This section should include thorough background information on the technological advances associated with the resources as well as the cultural and social history of life at the light station.
 - ii. Chronology of Development and Use. Physical construction, modification, and use of the structure are summarized in this section. The text should be based on historical documentation with corroboration from first-hand observation and materials analysis.
 - iii. Physical Description. This section contains a systematic accounting of all features, materials, and spaces according to age, significance, and condition. Copies of inspection reports should be included in the appendix but summarized in the body of the chapter. The text should also discuss causes of deterioration and structural adequacy.
- c. Part 2, Treatment and Use.** Emphasis is on preserving extant historic material and resolving conflicts that might result from a structure's reuse and treatment. Design work need not go beyond schematics.
 - i. Ultimate Treatment and Use. This narrative discusses and analyzes the ultimate treatment and use of the structure. If they have not been defined, this section may recommend an ultimate treatment and use. This section should establish a recommended period or periods of significance and/or a period of interpretation if this has not been done in the national register nomination. Measured drawings of relevant building specifications used to determine project needs and costs

should be included in the appendix. At a minimum, drawings must include floor plans and elevations of each structure. This section will include the preliminary plans with a prioritized work schedule and cost estimates for the recommended treatments.

- ii. Requirements for Treatment. In concise terms, this section outlines applicable laws, regulations, and functional requirements. Specific attention should be given to issues of human safety, fire protection, energy conservation, abatement of hazardous materials, and handicapped accessibility. Hazardous materials testing should be included as part of the report if it has not already been done.

d. Appendix

- i. Bibliography
- ii. Drawings
- iii. Photographs
- iv. Materials Analysis
- v. Reports

3. Project Specifications

a. Consultant Qualifications

The lead member of each project team must meet the Secretary of the Interior's "Professional Qualifications Standards" (36 CFR Part 6) in the fields of Architecture and/or Architectural History. If team members are not already included in the SHPO's Historical Architect List and/or Historian/Architectural Historian list, the proposal must demonstrate team member qualifications that meet or exceed the "Professional Qualifications Standards."

All project related work must be in compliance with the Secretary of the Interior's Standards for the Treatment of Historic Properties with Guidelines for Preserving, Rehabilitating, Restoring and Reconstructing Historic Buildings.

The HSR must follow the standards and recommended approaches outlined in Preservation Brief #43: The Preparation and Use of Historic Structure Reports, and NPS-28: Cultural Resource Management Guideline, as well as common industry practices.

b. Research

Due to the remote and isolated nature of these sites, a pre-bid site visit will not be offered. Therefore, bidders are encouraged to contact the non-profit stewards of these sites to determine the extent of historical information available, acquire copies of any reports or material testing studies that have been completed, and to gain information about transportation and accommodations available at each location.

Bid proposals must include a detailed description of the research that will need to be undertaken to complete the reports. The description should include potential sources of historic documentation, research locations, and identification of team members who will complete the research.

Bid proposals must also include hazardous materials testing, mortar analysis, and paint color analysis if these studies have not already been undertaken. Be as specific as possible as to the type of analysis and how many samples will be taken.

4. Schedule

It is expected that a contract with the selected consultant will be executed in October 2016. The 75% draft of the HSR will be submitted for review in June 2017. The 95% draft of the HSR will be due in September 2017. The final HSR will be submitted in January 2018. Regional presentations will take place in early 2018 with an expected project completion and close out date of March 31, 2018. Gull Rock Light Station, Manitou Island Light Station, and Stannard Rock Lighthouse were all transferred out of federal ownership through the National Historic Lighthouse Preservation Act of 2000 (NHLPA). The reports for these three resources will be reviewed by the National Park Service Midwest Regional Office. The Thunder Bay Island Light Station was transferred out of federal ownership via a land patent. The report for the Thunder Bay Island Light Station will be reviewed by the Bureau of Land Management Northeastern States District (BLM). The SHPO and the nonprofit stewards will also review the HSR. The work schedule should include a minimum of 30 days for these reviews for each draft of the report. This project schedule is driven by grant requirements and deadlines. Please submit a detailed work schedule with the proposal. HSR draft submittal dates provided in the bid proposal may vary from those provided above, but the final project completion date must be March 31, 2018.

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**MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
REQUEST FOR PROPOSALS**

EXHIBIT A

NOTICE TO BIDDERS

I. Bidder Qualifications/Requirements

Proposals not including requested information may be viewed by the Authority as non-responsive and not considered further. Bidders are strongly encouraged to review their proposals prior to submission to ensure that all requested information is included.

- A. Bidder's Experience.** The Authority has identified the following qualifications that it believes are necessary for the successful performance and completion of the services described in the Scope of Work. The Bidder must:
1. Have experience completing HSRs and related studies; and
 2. Assign experienced personnel to perform the services or have personnel supervised by experienced staff.
- B. Bidder's Authorized Signatory.** An official authorized to commit the Bidder to the terms and conditions of the proposal must sign the proposal being submitted. The Bidder must clearly identify the full title and authorization of the designated official and provide a statement of bid commitment with the accompanying signature of the official. Attach any resolutions authorizing the approved signatory with the proposal. Include the name and telephone number of person(s) in your organization authorized to expedite any proposed contract with the Authority.
- C. Bidder Organization Authorized to Transact Business in Michigan.** The Bidder must be either a Michigan entity (limited partnership, Limited Liability Company, for-profit corporation or non-profit corporation, etc.) or, if foreign, authorized to do business in the State of Michigan.

Proposals from Sole Proprietors Will Not be Accepted

Questions regarding specific requirements to transact business in the State of Michigan should be referred to or otherwise contact the Michigan Department of Licensing and Regulatory Affairs, Corporations, Securities & Commercial Licensing Bureau at:

http://www.michigan.gov/lara/0,4601,7-154-61343_35413---,00.html.

- D. Bidder's Minimum Internet/Technological Capabilities.** The Bidder must have phone, internet, and e-mail access. Internet and e-mail access must be adequate enough to allow the Bidder to receive, download and upload data, files and attachments from Authority staff. (Current state standards are limited to a functional size of 20 MB).
- E. Limits on Liability & Indemnification.** The Bidder must review and acknowledge that the Authority will require the Bidder to satisfy the following requirements prior to the execution of a contract with the Authority. If the Bidder has objections, please provide an explanation with your proposal outlining the objection.

If awarded a contract, the Bidder agrees to:

1. Indemnify, defend and hold harmless the Authority, its Board, officers, employees and agents, from and against all losses, liabilities, penalties, fines, damages and claims (including taxes), and all related costs and expenses (including reasonable attorneys' fees and disbursements and costs of investigation, litigation, settlement, judgments, interest and penalties), arising from or in connection with any of the following:
 - a. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from (1) the services provided ("Services") or (2) performance of the Services, duties, responsibilities, actions or omissions of the Bidder or any of its subcontractors under an awarded contract.
 - b. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from a breach by the Bidder of any representation or warranty made by the Bidder in an awarded contract.
 - c. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or related to occurrences that the Bidder is required to insure against as provided for in an awarded contract.
 - d. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents arising out of or resulting from the death or bodily injury of any person, or the damage, loss or destruction of any real or tangible personal property, in connection with the performance of services by the Bidder, by any of its subcontractors, by anyone directly or indirectly employed by any of them, or by anyone for whose acts any of them may be liable; provided, however, that this indemnification obligation shall not apply to the extent, if any, that such death, bodily injury or property damage is caused solely by the negligence or reckless or intentional wrongful conduct of the Authority.
 - e. any claim, demand, action, citation or legal proceeding against the Authority, its employees and agents which results from an act or omission of the Bidder or any of its subcontractors in its or their capacity as an employer of a person.
 - f. any action or proceeding threatened or brought against the Authority to the extent that such action or proceeding is based on a claim that any piece of equipment, software, commodity or service supplied by the Bidder or its subcontractors, or the operation of such equipment, software, commodity or service, or the use or reproduction of any documentation provided with such equipment, software, commodity or service infringes any United States or foreign patent, copyright, trade secret or other proprietary right of any person or entity, which right is enforceable under the laws of the United States.

- F. Bidder's Insurance Coverage.** The Bidder must maintain and provide evidence, satisfactory to the Authority, of the following minimum insurance coverage:
1. General Liability Insurance for \$1,000,000 with the Authority shown as additional insured;
 2. Errors and Omissions Insurance for \$1,000,000 for each occurrence and \$1,000,000 annual aggregate;
 3. Worker's Compensation Insurance (if required under state law). Any citing of a policy of insurance must include a listing of the States where that policy's coverage is applicable.
 4. If required by the Authority, Cyber Security Insurance for \$1,000,000.
- G. Project Personnel.** Bids must acknowledge and identify project personnel who will be performing services pursuant to an awarded contract and (a) sign the contract on behalf of the selected contractor and/or (b) are listed in the form attached and incorporated into this RFP as Exhibit D.

II. Notifications to Bidders

- A. Questions Regarding RFP.** Questions raised by Bidders concerning the RFP must be submitted in writing via either email or fax.
- To ensure a fair and impartial process, the Authority's Procurement Office will only address those questions concerning the RFP submitted in writing via email or fax.
 - Phone calls involving the RFP or related questions will not be accepted.
 - Firms submitting bids shall not contact any Board members or Authority staff.
 - Submit questions using the subject line **SHPO Offshore Lights RFP** to the attention of:

**Michigan State Housing Development Authority
c/o Procurement Office
735 E. Michigan Avenue
Lansing, Michigan 48912**

**E-mail: MSHDA-Procurement@michigan.gov
Fax: (517) 335-0125**
 - Address all questions regarding the RFP to the Authority's Procurement Office.
 - Questions must be received in writing by **August 11, 2016 at 4pm** Detroit, Michigan Time.
 - Responses to properly submitted questions will be posted on or about August 16, 2016.

- The Authority will hold no other question sessions or bidder's conferences.
 - All questions and answers related to this RFP will be supplied to Bidders providing the Procurement Office with notification of intent to submit a proposal.
- B. Revisions to RFP.** If, prior to the proposal deadline, the Authority deems it necessary to provide additional clarifying information, or to revise any part of the RFP, supplements or revisions will be provided to all Bidders who have indicated they will submit a proposal. Proposals will then be evaluated based on the terms and conditions of the RFP, any supplements or revisions to the RFP, and the answers to any written questions.
- C. Michigan Freedom of Information Act.** All documents submitted to the Authority are subject to the Michigan Freedom of Information Act ("FOIA"). In the event a request for submitted documents is made to the Authority, the Authority's FOIA Coordinator will redact or withhold information and/or documents that are exempt from disclosure under FOIA. See *MCL 15.243 et seq.* Please note that any requests by non-MSHDA personnel to review proposals will be denied until the deadline for submission of the bids has expired. See *MCL 15.243(1)(i).*

Please submit FOIA requests to the Authority as follows:

**MSHDA FOIA Coordinator
c/o Legal Affairs
735 E. Michigan Avenue
Lansing, MI 48912**

- D. Payments to Pensioned Retirees.** 2007 PA 95, MCL 38.68c requires retirees of the State Employees Retirement System ("Pensioned Retirees") who become employed by the State either directly or indirectly through a contractual arrangement with another party on or after October 1, 2007 to forfeit their respective state pensions for the duration of their reemployment. **Accordingly, any pensioned retiree who provides or renders services pursuant to the contract for which bids will be made under this RFP shall be required to forfeit his or her pension during the term of the contract.**

Proposals must acknowledge and confirm whether pensioned retirees will render services under the contract being sought through this RFP. If the Bidder intends to use a pensioned retiree, the Bidder must submit written confirmation from the pensioned retiree that he or she agrees to forfeit his or her pension during the term of the contract, if awarded. If awarded a contract, the Bidder must submit a copy of the pensioned retiree's directions to the State of Michigan's Office of Retirement Services ("ORS") to withhold the retiree's pension payments until the end of the contract term by having the pensioned retiree complete a Retiree Rehire Certificate. A copy of the Retiree Rehire Certificate will be required to be submitted prior to executing an awarded contract.

- E. Contract Award Approvals.** Prior to executing an awarded contract, the Authority must seek and obtain Michigan Civil Service approval. The required forms will be submitted to Civil Service prior to final approval.

An awarded contract will be forwarded to the selected Bidder with instructions to review, sign, and return two “originals”. Upon receiving the signed “originals”, the Authority’s Procurement Office will submit the signed “originals” to a duly authorized signatory for final execution on behalf of the Authority. One fully executed “original” will then be returned to the selected contractor.

F. Applicable Laws. The selected contractor will be required to comply with all Michigan and federal laws, as well as acquire any permits or permission-related documents to provide services being sought.

G. Submissions Subsequent to Award. As part of an awarded contract, the selected contractor will be required to review and provide and/or acknowledge additional documents including but not limited to:

- Certifications Regarding Debarment, Suspension and Other Responsibility Matters form.
- W-9 Request for Taxpayer Identification Number and Certification.
- Retiree Rehire Certificate.

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**MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
REQUEST FOR PROPOSAL**

EXHIBIT B

PROPOSAL SUBMISSION

I. Submitting Proposal

- Bidders wishing to submit proposals must submit an electronic copy of a proposal to provide the services described in the Scope of Work.
- Submitted proposals must respond to and address the tasks, activities, listed requirements and questions outlined in the Scope of Work of this RFP and its attached and incorporated exhibits.
- The Authority shall not be liable for any costs that a Bidder may incur while preparing a proposal.
- The Authority shall not be liable for any costs that a Bidder may incur prior to the complete execution of a contract.
- If the Authority enters into a contract, the Authority's consideration (payment) shall be limited to the term of the contract.

II. Proposal Delivery

- A. Due Date.** Proposals responding to this RFP are due **August 25, 2016 at 4 pm** Detroit, Michigan Time.
- B. Originals and Copies.** Submit one proposal in electronic format via email or fax outlining how the Bidder will provide the services described in the Scope of Work.
- C. Delivery of Proposal.** Direct all deliveries to:

**Email: MSHDA-Procurement@michigan.gov
Fax: (517) 335-0125**

- D. Commencement of Work.** Project work shall not commence until execution of a project contract. The selected contractor shall not proceed with performance of the project work or incurring of project costs until both parties have signed the project contract to show acceptance of its terms and conditions.
- E. Project Control.** The selected contractor will carry out this project under the direction and control of the Authority and its designated Contract Administrator.

III. Selection of Proposal

The selected proposal will be from a responsive historic preservation consultant or team of consultants with the necessary breadth of knowledge, experience, and resources to undertake and successfully complete all aspects of the project. The consultant or consultant team should have professional expertise and experience in completing HSRs and related studies and should include the following disciplines: historic architecture, architectural history, and historical research. Material assessments including paint color analysis, hazardous materials testing, and

mortar analysis may be required. Structural and MEP engineering consultants may be needed to provide assessments, recommendations, and cost estimates depending on future agreed upon uses. Preference will be given to a consultant team with experience related to historic maritime resources.

The selection of a proposal shall be subject to a review by the Authority's Legal Affairs Division concerning conflicts of interest and/or participation in Authority programs by the Bidder, its officers, employees, subcontractors or independent contractors.

A. Selection Criteria. The Authority will select the highest scoring proposal based on the following Selection Criteria:

- | | | |
|----|---|-------------|
| 1. | Adherence to required proposal format | (10 Points) |
| 2. | Understanding of project goals | (20 Points) |
| 3. | Project approach and proposed methodologies | (25 Points) |
| 4. | Expertise of the consulting team members and their experience on similar projects | (25 Points) |
| 5. | Preference for one consultant for all four project components | (10 Points) |
| 6. | Reasonableness and feasibility of fee | (10 Points) |

Total Possible Points:

100 Points

B. Proposal Selection. The Authority's review may take up to four weeks after the closing date for submitting proposals. The Authority anticipates notifying the selected contractor in October 2016 via e-mail and posting on the Authority's website; however, the selection and final notice of award will be contingent on approval by the Michigan Civil Service Commission and the Authority's Board.

C. Cancellation of Selected Proposal. The selection of a proposal by the Authority may be cancelled at any time prior to the complete execution of a contract. If the Authority cancels its selection of a proposal, the Authority may repost this or a similar RFP and re-seek proposals. Reasons for canceling the selected proposal may include, but are not limited to, the following:

1. Refusal of Department of Civil Service to process required forms.
2. Refusal of duly authorized Authority signatory to execute the contract.

**MICHIGAN STATE HOUSING DEVELOPMENT AUTHORITY
REQUEST FOR PROPOSAL**

EXHIBIT C

PROPOSAL FORMAT

I. Overview

- Proposals must be submitted in the format described in this Exhibit C as outlined below.
- There should be no attachments, enclosures or exhibits other than those considered by the Bidder to be essential to a complete understanding of the proposal.
- Each section must be clearly identified with appropriate headings and/or table of contents.
- The proposal should be clear, accurate, and complete, with sufficient detail to enable the Authority to evaluate the services and methods proposed.

II. Headers/Table of Contents

A. Business Organization. Include the following information:

1. The full name and address of Bidder, including any “Doing Business As” titles.
2. The branch office or name and address of registered agent, if applicable.
3. The type of entity (e.g., Michigan corporation, Michigan nonprofit corporation, Michigan limited liability company, foreign). Note that the selected contractor will be required to provide proof of authorization to conduct business in the State of Michigan.

B. Management and Personnel. Answer/Address the following:

1. **Officer and Management Summary.** Identify managers and/or officers who will manage the contract if it is awarded and provide their resumes or CVs. Identify officers and managers by name and position. List their responsibilities and the specific tasks each officer and manager assigned to the project will carry out and the anticipated time frames for each task. Provide current contact information including the manager(s) and/or officer(s) name, title, mailing address, email address, and phone and fax numbers.
2. **Personnel Summary.** Identify proposed key project personnel, including job titles, responsible for performing the activities and services described in the above Scope of Work.
3. **Confirm Whether Any Assigned Personnel Receive Pension Payments from the State of Michigan.** If any assigned personnel receive pensions from the State of Michigan, you must provide confirmation, signed by each assigned person with a State of Michigan pension, that he or she acknowledges and agrees that he or she must forfeit any pension payments made during the term of the contract. If a

contract is awarded, each assigned person with a State of Michigan pension must submit a copy of the pensioned retiree's directions to the State of Michigan's Office of Retirement Services to withhold the retiree's pension payments during the contract term.

C. Experience.

- 1. Prior Experience of Bidder.** Indicate prior experience of your organization that you consider relevant to the successful accomplishment of the project described in this RFP. Include sufficient detail to demonstrate the relevance of such experience. Include descriptions of qualifying experience, including project descriptions, costs, and starting and ending dates of projects successfully completed. Also include the name, address, and telephone number of the responsible official of the client organization who may be contacted.
- 2. Experience of Proposed Personnel Assigned to Provide Services.** Include an organizational chart and a staffing plan with the name and role of the personnel who will be assigned to provide the proposed services, including managers who may oversee work of personnel. Indicate the anticipated amount of time each person will work on the project, and indicate which personnel will participate in site visits. Note: anticipated hours should be reflected in the budget outlined below.
- 3. Professional References.** Include **three** professional references from similarly completed projects. Include client name, contact person and their title, and telephone and/or email address.
- 4. Additional Information and Comments.** Include any other information that is believed to be pertinent but not specifically asked for elsewhere.

D. Proposed Services.

- 1. How Services Will be Rendered.** Address and describe the process used to render the services outlined in the above Scope of Work, and how the services will be rendered. This should be an overview of the methodology to be used, based on staff and time frames, to meet the project scope of work and complete the required services within the time frame of the project. This section should clearly indicate the consultant's understanding of the project objectives, scope, and requirements.
- 2. Use of Subcontractors.** If any work will be subcontracted, describe the following:
 - a. Work that will be subcontracted.
 - b. The process used to select the subcontractors.
 - c. The subcontractor's experience and expertise.
 - d. The names of the firms/individual(s) who will perform the subcontracted work.
 - e. How quality of service will be monitored and ensured.

3. Standards. Describe or address the following:

- a. The standards that the services will satisfy. (If standards of a professional association will be followed, identify the standards and the association.)
- b. How quality of service will be monitored and ensured.
- c. Whether "best practices" will be followed. (If applicable, identify the organization and/or document establishing such standards.)

4. Security of Data. If the services to be rendered require the collection and/or use of confidential and/or personal data, confirm the following:

- a. Has your organization established and used a policy to address the security of paper and electronic data? (***Please do not submit a copy of your security policy.***)
- b. Does your policy address the removal of confidential and/or personal data from storage media? (For example, does your firm's policy include the removal or "wiping" of data from hard drives when a computer is no longer used?)

5. Copyrighted Materials.

- a. Any and all documents submitted in the course of this project will not contain in part or whole copyrighted materials.
- b. The consultant may copyright any books, publications, or other copyrightable materials developed in the course of this project. However, any such copyrighted material shall be subject to royalty-free, non-exclusive, worldwide, and irrevocable license to the NPS and SHPO to reproduce, publish, or otherwise use, and to authorize others to use, the work for any governmental purpose.

E. Price Proposal & Budget

- 1. Price Proposal.** All rates quoted in proposals submitted in response to this RFP will be a firm fixed price for the duration of the contract. No price changes will be permitted.

A fee proposal may be submitted for one, two, three, or all four project components. The SHPO may elect to choose separate consultants for each of the four components, or may elect to select one consultant for all four. The price fee proposal should appropriately reflect this breakdown. It is assumed that there will be a cost savings for the SHPO if one consultant is selected for this project. The fee should be stated accordingly.

- 2. Budget.** Include in the proposal a line item budget identifying all expenses related to the work to be performed. By submitting the bid, the Bidder acknowledges that it bears the risk that its expenses may exceed the proposed amount. The budget should include applicable items, which may include the following:

- a. Staff costs (# of hours/per hour rate, etc.).
- b. Costs of supplies and materials.

- c. Other direct costs.
- d. Transportation costs.
- e. Total budget.

F. Schedule/Timeline. Bids must include a schedule for delivery of services set forth in the Scope of Work and cite the proposed deadlines for completing the tasks within the Scope of Work. All work must be completed by March 31, 2018.

Include a timetable indicating how the project will be scheduled. The timetable should include: (1) any proposed meetings; (2) dates for draft submittals; (3) review times (allow 4 weeks for Authority review) and completion dates for deliverables; and (4) any presentations to be given during the project period. A proposed schedule/timeline is listed below:

<i>Service/Project Components</i>	<i>Estimated Completion Dates</i>
(Using Scope of Work, Bidder should insert tasks and activities to be completed)	(Bidder should insert estimated deadlines)

G. Disclosure of Participation and Interests in Authority Programs.

- 1. Disclosure of Interests in Authority Programs.** Authority programs include, but are not limited to, the Housing Voucher Program, any loans where the Authority is the lender, and any grants made by or administered by the Authority.
- 2. Submission of Conflicts of Interests.** Submit a list of all interests that the Bidder, its officers, board members, and employees respectively have in Authority programs. If the Bidder intends to use independent contractors or subcontractors to render services, include the interests that independent contractors or subcontractors and their officers, board members, and employees respectively have in Authority programs.
- 3. Potential Conflicts of Interests.** Indicate in the proposal whether the Bidder is currently under contract and/or has been awarded a grant from the Authority. Please confirm whether any potential conflict of interest will exist if the Authority enters into a contract with the Bidder.

Potential conflicts of interest may arise from the Bidder's officers, employees, members, board members, independent contractors or subcontractors the Bidder will use to render services if the firm enters into a contract with the Authority.

If the Bidder is currently under contract or is receiving a grant from the Authority, indicate if the Bidder or project personnel holds a position with another entity that may be under contract or receiving a grant from the Authority.

Include an organizational chart from each entity under contract or awarded a grant from the Authority in which the Bidder or project personnel holds a position. Include each employee's position and title within the entity. In addition, indicate whether the Bidder or the project personnel is responsible for making financial decisions in his/her capacity and what measures have been implemented to ensure that funds are not comingled.

4. **Family Members Who Work for Authority.** Please list the names of the Bidder's officers, board members, and employees who have family members who work for the Authority and the names of the family members who work for the Authority.
- H. **Signature Clause to be Signed by Bidder's Authorized Signatory.** Insert into the proposal and have the authorized signatory sign the following signature clause at the end of the proposal:

I confirm that I have submitted this proposal on behalf of

_____ in response to the
Michigan State Housing Development Authority's Request for Proposals for
Michigan Offshore Lights Historic Structure Report and Public Education Project.

I also confirm that I have read and understand the Authority's indemnification, copyright, data security and insurance requirements.

By: _____

Title: _____

Date: _____

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MSHDA RFP – EXHIBIT D

**CERTIFICATE VERIFYING PROJECT PERSONNEL OF THE
CONTRACTOR/SUBCONTRACTOR**

The Contractor/Subcontractor acknowledges that the following personnel are Project Personnel of the Contractor/Subcontractor:

(1) Name _____
(Print or type name above line)

Title with Contractor/Subcontractor _____

Is this person a retiree who receives a pension from the Michigan State Employees Retirement System? Yes _____/No _____

(2) Name _____
(Print or type name above line)

Title with Contractor/Subcontractor _____

Is the person a retiree who receives a pension from the Michigan State Employees Retirement System? Yes _____/No _____

(3) Name _____
(Print or type name above line)

Title with Contractor/Subcontractor _____

Is the person a retiree who receives a pension from the Michigan State Employees Retirement System? Yes _____/No _____

Name of Signatory for Contractor/Subcontractor:

Printed Name: _____
(Print or type name above line)

Its: _____

Signature: _____

Federal Identification Number: _____